

# Daily Market Monitor

August 08, 2025

**TATA**  
mutual fund

## Domestic Market Performance

Indian market indices	7-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24596	0.09	-3.40	10.16	1.23
BSE Sensex	80623	0.10	-3.38	9.47	1.45
BSE 100	25777	0.17	-3.42	10.66	0.12
BSE 200	11157	0.15	-3.48	10.47	-0.98
BSE 500	35634	0.13	-3.56	11.21	-1.34
BSE SmallCap	52136	-0.18	-4.60	20.78	-2.14
BSE MidCap	45279	0.30	-3.13	15.15	-3.31
BSE LargeCap	9470	0.12	-3.44	9.08	-0.77
Sectoral indices					
BSE IT	34154	0.73	-10.28	-4.18	-14.51
BSE Oil & Gas	26057	-0.17	-8.39	-5.74	-18.56
BSE FMCG	20351	-0.05	-0.62	5.34	-9.75
BSE Auto	53216	0.25	-0.60	8.29	-5.95
BSE Bankex	61770	0.14	-2.84	15.43	8.31
BSE Teck	16945	0.41	-9.65	5.18	-7.69
BSE Capital Goods	67849	-0.41	-5.77	11.33	-6.01
BSE Consumer Durable	60040	0.18	-1.65	14.85	2.52

Turnover (Rs Cr)	7-Aug	6-Aug
BSE Cash	11915	10373
NSE Cash	98041	89123
NSE F&O	61369371	20009728

Rs. Cr (Equity)	FII Inv 6-Aug	MF Inv 4-Aug	DII Inv 7-Aug
Buy	11,690	10,405	19,116
Sell	16,088	7,140	8,356
Net	-4,399	3,265	10,760
Net (MTD)	-6,250	4,747	26,479
Net (YTD)	-102,693	287,399	427,674

	7-Aug	1Day	Month ago	Year ago
USD	87.69	87.70	85.82	83.95
GBP	117.27	116.69	116.76	106.69
Euro	102.38	101.60	100.86	91.62
100 Yen	59.59	59.47	59.15	56.91

## Indian markets

- Indian equity benchmarks ended higher on Thursday due to short covering at lower level.
- The top losers were, Adani Enterprises, Adani Ports, Trent, Tata Motors and Grasim, down 0.80-2.20%.
- The top gainers were Hero MotoCorp, Tech Mahindra, JSW Steel, Wipro and Eternal, up 0.97-4.15%.

## Indian debt

- The interbank call money rate ended higher at 5.80% on Thursday compared to 4.90% on Wednesday.
- Government bond prices ended higher on Thursday due to short covering at lower levels.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.39% on Thursday compared to 6.41% on Wednesday.

## Indian Rupee

- The rupee ended flat against the US dollar on Thursday as earlier gains owing to a weak dollar and crude oil prices were capped due to the additional 25% duty imposed by the US on Indian imports.

## Regulatory

- The Reserve Bank of India (RBI) has directed banks not to insist on the production of legal documents where an account was opened with a survivorship clause and has nominees or survivors.
- According to a latest survey by RBI, India's merchandise imports to grow by 2 times more than exports in the current financial year.
- The Reserve Bank of India (RBI) plans to conduct two Variable Rate Reverse Repo (VRRR) auctions on Friday—of six-day and three-day tenures—to withdraw a total of Rs 3 trillion from the banking system.
- Sebi mandated a unified annual inspection for stock brokers and depository participants to be conducted jointly by all relevant market infrastructure institutions, replacing the existing practice of separate assessments by each entity.
- Sebi proposed introducing activity-based regulation for Registrars and Transfer Agents (RTAs), whereby services provided to listed companies would fall within its regulatory ambit and those for unlisted firms would be overseen by the Ministry of Corporate Affairs (MCA).

## Economy and Government

- The Rajasthan government signed 1,600 memoranda of understanding (MoUs) with a proposed investment of over Rs 1.37 trillion in the tourism sector
- The power ministry planned to develop an additional 97 GW coal and lignite-based electricity generation capacity to achieve the required 307 GW of thermal installed capacity by 2034-35.

## Domestic Debt Market Indicators

Instrument	7-Aug	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.80%	4.90%	4.90%	5.50%	6.24%	6.25%
3-Month T-Bill	5.41%	5.42%	5.33%	5.87%	6.93%	6.62%
6-Month T-Bill	5.51%	5.50%	5.41%	5.87%	7.04%	6.70%
1-year T-Bill	5.51%	5.55%	5.52%	5.84%	7.07%	6.72%
3-Month CD	5.77%	5.80%	5.73%	6.50%	7.55%	7.18%
6-Month CD	6.03%	6.03%	6.00%	6.65%	7.37%	7.43%
1-year CD	6.26%	6.26%	6.16%	6.73%	7.62%	7.60%
3-Month CP	6.18%	6.18%	6.20%	6.80%	8.15%	7.63%
6-Month CP	6.36%	6.36%	6.40%	6.96%	7.71%	7.83%
1-year CP	6.70%	6.70%	6.60%	7.07%	8.10%	7.91%
1-year Gilt	5.64%	5.64%	5.57%	5.90%	7.14%	6.72%
3-year Gilt	5.92%	5.90%	5.81%	6.00%	7.16%	6.76%
5-year Gilt	6.14%	6.15%	6.05%	6.04%	7.05%	6.78%
1-year AAA	6.53%	6.55%	6.45%	6.97%	7.70%	7.64%
3-year AAA	6.71%	6.73%	6.63%	6.98%	7.70%	7.58%
5-year AAA	6.75%	6.77%	6.67%	6.99%	7.70%	7.51%
10-year G-sec	6.39%	6.41%	6.30%	6.34%	7.05%	6.86%
Net LAF (Rs Cr)	390651	397133	343837	142337	-73145	197620
Forex reserves (\$ bn)	698.19	695.49	702.78	688.13	642.49	667.39

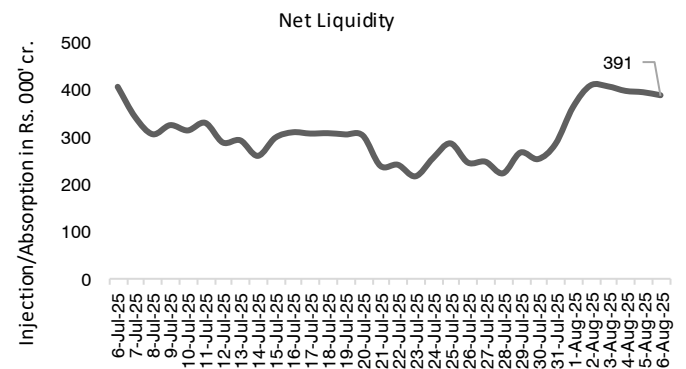
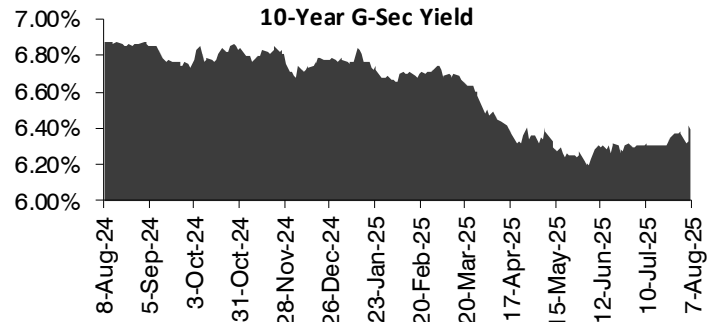
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.51	6.30	7.01	7.05	8.28	8.81
1 Year	5.64	6.53	7.24	7.28	8.51	9.04
3 Year	5.92	6.71	7.42	7.46	8.69	9.22
5 Year	6.14	6.75	7.56	7.59	8.83	9.36
10 Year	6.39	6.98	7.79	7.82	9.06	9.59

Rs. Cr (Debt)	FII Inv 6-Aug	MF Inv 4-Aug
Buy	454	14,781
Sell	121	25,113
Net	333	-10,332
Net (MTD)	1,042	-33,043
Net (YTD)	4,024	-359,978

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	2.10% (Jun-25)	3.34% (Mar-25)	5.08% (Jun-24)
WPI	-0.13% (Jun-25)	2.25% (Mar-25)	3.36% (Jun-24)
IIP	1.5% (Jun-25)	3.9% (Mar-25)	4.9% (Jun-24)
GDP	7.4% (Jan-Mar FY25)	6.4% (Oct-Dec FY25)	9.5% (Jan-Mar FY24)
India Manufacturing PMI	59.1 (Jul-25)	58.1 (Mar-25)	58.1 (Jul-24)
India Service PMI	59.2 (Jul-25)	58.5 (Mar-25)	60.3 (Jul-24)
Bank Credit Growth*	-0.44% (July 11, 2025)		1.54% (June 27, 2025)
Bank Deposit Growth*	-0.11% (July 11, 2025)		0.92% (June 27, 2025)

## Capital markets

- OppenheimerFunds sold shares of private sector lender Kotak Mahindra Bank for Rs 2,035 crore through an open market transaction.
- Xovian Aerospace raised \$2.5 million in a pre-seed funding round led by Piper Serica and Turbostart, with participation from Inflection Point Ventures (IPV) and Eaglewings Ventures.
- BLS Polymers filed preliminary papers with markets regulator Sebi to seek its approval for raising funds through an initial public offering (IPO).



Global market indices	7-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	43968.64	-0.51	-0.99	10.45	13.43
Nikkei 225	41059.15	0.65	3.72	2.22	17.01
FTSE	9100.77	-0.69	3.34	14.44	11.44
Hang Seng	25081.63	0.69	5.00	51.63	48.61
Taiwan	24003.77	2.37	7.02	19.15	12.72

Global debt	7-Aug	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.23	4.22	4.40	4.26	4.21	3.96
UK 10-Year (%)	4.56	4.52	4.58	4.46	3.98	3.95
German 10-Year (%)	2.64	2.64	2.61	2.47	2.29	2.27
Japan 10-Year (%)	1.47	1.50	1.47	1.31	0.71	0.91

Domestic	7-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	100703	0.25	4.25	49.74	46.07
Silver (Rs / Kg)	115250	1.56	8.18	55.48	45.59
Aluminium (Rs / Kg)	256	1.33	2.92	22.84	20.86
Copper (Rs / kg)	889	0.49	-0.21	17.13	14.49
Lead (Rs / kg)	184	-0.35	0.14	2.02	-1.13
Zinc (Rs /Kg)	273	0.93	5.23	24.91	9.81
Nickel (Rs / kg)	1344	0.19	1.75	-5.49	-2.03

Global	7-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3371.89	-0.25	1.00	-0.25	41.44
Silver (oz/\$)	3785.00	0.05	2.49	0.05	41.02
Brent (\$/bbl)	66.43	-0.69	-4.53	-0.69	-15.19
NYMEX crude (\$/bbl)	63.88	-0.73	-5.96	-0.73	-15.09

## Global markets

- Wall Street stocks ended mixed on Thursday with Dow Jones declined due to stock specific losses while Nasdaq rose buoyed by technology stocks after US exempted domestic semiconductor manufacturers from the latest tariffs.
- 10-year US bond yield ended higher at 4.23% after US President said he will nominate Miran to Federal Reserve.
- FTSE index ended lower on Thursday after Bank of England cut interest rates by a quarter percentage points.
- Asian markets were trading higher at 8.30 AM.
- US inflation rate accelerated for the second consecutive month to 2.7% in June up from 2.4% in May while core inflation ticked up to 2.9% from a four-year low of 2.8%.
- Eurozone industrial production rose by 3.7% on year in May 2025, accelerating from a downwardly revised 0.2% gain in April.

## Commodity

- Crude oil prices fell by 47 cents to \$63.88 a barrel on the NYMEX as US switched stance on Russia over Ukraine war.
- Domestic gold prices ended higher due to safe haven appeal following new US tariff announcements.

## Forthcoming results

Date	Company
8-Aug	State Bank of India
8-Aug	Tata Motors
8-Aug	Info Edge India

## Upcoming market indicators

Date	Indicator	Previous
Aug 9	China Inflation Rate, Jul	0.1%
Aug 12	US Inflation Rate, Jul	2.7%
Aug 13	Japan PPI, July	2.9%
Aug 14	US PPI, Jul	148.236
Aug 15	US Industrial Production, Jul	0.7%

**Source:** Domestic Indices - NSE, BSE, FII / MF (Equity) – SEBI, Domestic Derivative Statistics – NSE, Currency Movement - RBI, Domestic Economic Indicators - CRISIL Center for Economic Research, Domestic Fixed Income Numbers - CRISIL Fixed Income Database, RBI Commodity Prices – Domestic -MCX, IBJA, International- gold.org, , Respective websites, International Indices, – Respective websites, Market summaries, global bond yields, domestic and international news – CRISIL Research, Respective websites

**Abbreviations:** FII (Foreign Institution Investors), CPI (Consumer Price Index), WPI (Wholesale Price Index), GDP (Gross Domestic Product), PMI (Purchasing Manufacturing Index), P/E (Price/Earnings ratio), CP (Commercial Papers), CD (Certificate Of Deposits), G-sec (Government Securities), T-Bill (Treasury Bill), DJIA (Dow Jones), FTSE (FTSE 100), Hang Seng (Hang Seng Index), USD (US Dollar), GBP (British Pound), ,100 Yen (Japanese Yen), MTD – Month to Date, FYTD – Financial Year to Date

\*Note: Bank credit and deposit growth are calculated on fortnightly basis.

Indicators		June-25	May-25	Apr-25	Mar-25	Feb-25	Jan-25	Dec-24	Nov-24	Oct-24	Sep-24
Debt Indicators	Currency in circulation (Rs billion)	38427	38344	37762	36997	36444	35893	35643	35,589	35,103	34,994
	Repo rate	5.50%	6.00%	6.00%	6.25%	6.25%	6.50%	6.50%	6.50%	6.50%	6.50%
	10-year G-sec yield	6.32%	6.27%	6.36%	6.58%	6.72%	6.69%	6.76%	6.75%	6.85%	6.75%
	Call rate	5.25%	5.75%	6.00%	7.00%	6.50%	6.65%	6.00%	6.70%	5.75%	6.24%
	Forex reserves (\$ billion; mthly. avg.)	698	689	682	656	638	629	648	666	694	688.744
	GDP	NA	NA	7.40%			6.40%			5.40%	
	Fiscal deficit (Rs billion)	NA	-1731.69	1863.32	2304.18	1773.1	2554.5	674.95	957.7	2763.0	393.44
	IIP, %y/y	NA	1.20%	2.70%	3.90%	2.90%	5.00%	3.20%	5.20%	3.50%	3.10%
	Exports, \$ billion	NA	38.73	38.49	41.97	36.91	36.43	38.01	32.11	39.2	34.58
	Imports, \$ billion	NA	60.61	64.91	63.51	50.96	59.42	59.95	69.95	66.34	55.36
	Manufacturing PMI	58.4	57.6	58.2	58.1	56.3	57.7	56.4	56.5	57.5	56.5
	Services PMI	60.7	58.8	58.7	58.5	59	56.5	59.3	58.4	58.5	57.7
	GST collections (Rs crore)	184597	201050	236716	196141	183646	195506	176857	182,269	187,346	173,240
	India crude oil import (mbpd)	NA	21.3	21.0	22.7	19.465	21.2	20.2	19.07	19.71	18.79
Sector update	Auto – Passenger vehicles	NA	-1.1%	5.9%	2.4%	2.4%	2.3%	9.8%	20.7%	14.9%	-1.0%
	Auto – Two-wheelers	NA	2.2%	-16.7%	11.4%	-9.0%	2.1%	-8.8%	-1.1%	14.2%	15.8%
	Auto – Commercial vehicles	NA	-1.0%	-2.1%	-1.0%	-3.3%	0.6%	3.4%	-5.3%	0.8%	-22.02%
	Auto – Tractors	NA	9.1%	7.7%	25.4%	13.6%	11.4%	14.0%	-1.3%	22.4%	3.7%
	Infra – Coal	10.04%	10.00%	10.20%	10.60%	10.60%	10.8%	11.50%	11.20%	11.80%	11.60%
	Infra – Electricity	9.60%	9.80%	10.30%	11.80%	11.30%	11.5%	11.28%	11.20%	11.70%	13.00%
	Infra – Steel	-6.80%	2.8%	3.5%	1.6%	1.7%	4.6%	5.3%	7.50%	7.80%	2.60%
	Infra – Cement	-2.80%	-4.7%	1.7%	7.5%	3.6%	2.4%	6.2%	4.40%	2.00%	-0.50%

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